

## **6.0 WORK ITEM SYSTEM**

The Work Item System exists to provide an inventory of work items, which are used to track repair and construction activities in government buildings. Work items are grouped into projects, which are then funded, executed, and tracked. Using the Work Item System, users can record work items from several sources (including work items that originate as conditions in the Safety Assessment System). The work items are placed in a pool, and made available to become part of projects. Work items that do not become part of projects can be archived directly via the Work Item screen. A work item can be removed from its original project and made available for assignment to another project.

Projects consist of a group of work items that are funded, planned, scheduled, executed, and tracked together. Very occasionally, a project may exist without having work items. Projects are tracked over their life in the Work Item System. Detailed scheduling and tracking of project progress for projects at the prospectus level takes place in the Project Manager's Toolbox (PMT) System, the companion system to IRIS.

Projects can be archived or deleted. Usually a completed project is eventually archived, thus archiving the project and all associated work items. Projects are generally not deleted unless they were never funded or carried out.

### **6.1 WHAT THE WORK ITEM SYSTEM RECORDS**

The Work Item System records work items and projects, and allows for the archiving of both work items and projects. Data on the work item describes the work to be done and the approximate projected cost. Data at the project level focuses on requested funding and actual cost, as well as schedule and progress.

A **work item** is a repair or construction activity that needs to be carried out in a building. Work items originate in several ways, including:

- Requests by the property manager
- Requests by the tenant
- Safety inspections of the building or its workplaces.

Work items typically cost from \$10,000 up to very large. The project funding a work item can be large enough to require direct Congressional approval. A work item cannot be funded or executed without becoming part of a project. Individual work items that are never approved as part of a project can be deleted or archived.

A work item can be assigned to only one project at a time, though work items can be moved from one project to another.

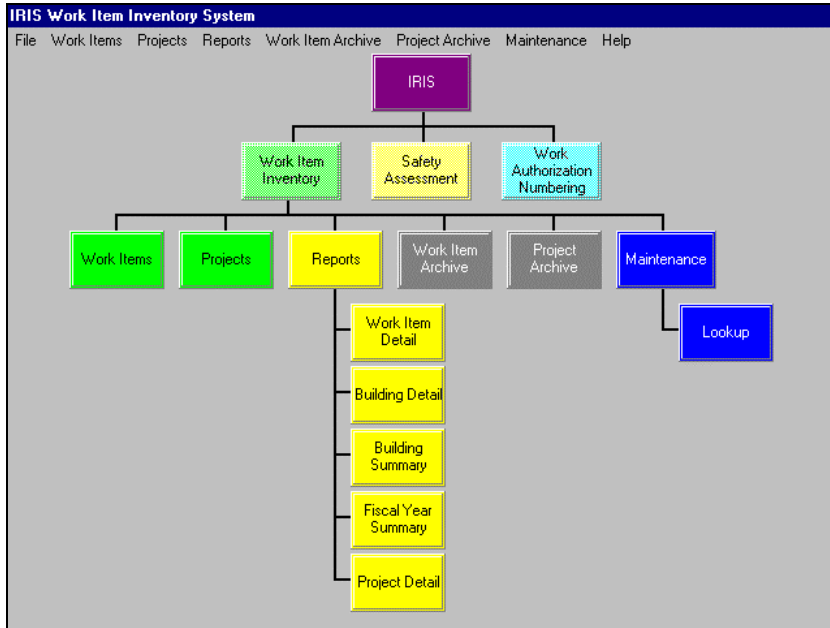
A **project** is a set of work items grouped together to be funded, planned, scheduled, and accomplished. While most projects are carried out on a single building, some consist of similar work items spread across buildings, such as elevator work in several buildings.

In the planning stages, the project is assembled from work items and then approved through a signed Project Authorization. At that point, the project is tracked and scheduled until completion.

## 6.2 ACCESSING THE WORK ITEM SYSTEM

To enter the Work Item System, select the **Work Item Inventory** button from the IRIS Main Menu screen, as shown in Exhibit 1-4, IRIS Main Menu. This will display the Work Item System Main menu, as shown in Exhibit 6-1.

**EXHIBIT 6-1**  
**Work Item System Main Menu**



To access another IRIS component, click the **Safety Assessment** button or the **Work Authorization Numbering** button.  
NOTE: Some users do not have access to all components of IRIS.

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## **7.0 WORK ITEM SYSTEM DATA ENTRY**

This chapter describes the data you can enter, edit, and view in the Work Item System, and the methods of carrying out Work Item functions. The Work Item System functions explained in this chapter are:

- View, edit, and archive current work items
- View, edit, archive, and delete current projects
- Associate work items with projects or remove them from projects.

### **7.1 WORK ITEM DATA**

To work with work items, click the **Work Items** button on the Work Item System menu. The Work Item Data screen will appear, as shown in Exhibit 7-1, except that no data appears until you select work items to view or create a new work item.

## EXHIBIT 7-1

### Work Item Data Screen

The screenshot shows the 'Work Item Data' window with a menu bar (File, Edit, Help) and several input sections. The top section contains fields for Building (NH0036ZZ, THOMAS J MCINTYRE FB, PORTSMOUTH, NH) and Work Item (0114). Below this is a row for Desired Completion (empty), Budget Activity (54), and checkboxes for Recurring (unchecked) and Non-Recurring (checked). The next row shows Work Category (1100, ISAs), Line Item (empty), and Phase (C). The following row includes Design Plan Year (1991), Construction Plan Year (1992), and Estimated Current Construction Cost (\$0.00). The bottom row of the top section has Priority (20), Regional Category (empty), ASID (RNH90127), and PCN (RNH90127). A large text area for Title contains 'BOILER REPLACEMENT'. Below the title is a Description field with a multi-line text entry: 'PURSUANT TO 2PMR INSPECTION OF MARCH, 1990, REPLACE THE TWO EXISTING 3.6 MBH HOT WATER BOILERS WITH TWO NEW BOILERS, DUAL BURNER SYSTEM, GAS/NO. 2 OIL IS RECOMMENDED. ALSO REPLACE EXISTING UNDERGROUND 15,000 GAL. STEEL OIL TANK WITH DOUBLE-WALLED FIBERGLASS TANK. SOME ASBESTOS REMOVAL WILL BE REQUIRED.' Below the description is a Comments field. At the bottom left, it says '6 of 9'. At the bottom right, there is a row of buttons: Search, Add, Update, Archive, First, Previous (highlighted), Next, Last, and Exit.

Building:	NH0036ZZ	THOMAS J MCINTYRE FB	PORTSMOUTH, NH	Work Item:	0114
Desired Completion:			Budget Activity:	54	<input type="checkbox"/> Recurring <input checked="" type="checkbox"/> Non-Recurring
Work Category:	1100	ISAs	Line Item:		Phase: C
Design Plan Year:	1991	Construction Plan Year:	1992	Estimated Current Construction Cost: \$0.00	
Priority:	20	Regional Category:		ASID:	RNH90127
		PCN:	RNH90127		
Title: BOILER REPLACEMENT					
Description: PURSUANT TO 2PMR INSPECTION OF MARCH, 1990, REPLACE THE TWO EXISTING 3.6 MBH HOT WATER BOILERS WITH TWO NEW BOILERS, DUAL BURNER SYSTEM, GAS/NO. 2 OIL IS RECOMMENDED. ALSO REPLACE EXISTING UNDERGROUND 15,000 GAL. STEEL OIL TANK WITH DOUBLE-WALLED FIBERGLASS TANK. SOME ASBESTOS REMOVAL WILL BE REQUIRED.					
Comments:					
6 of 9					
[Search] [Add] [Update] [Archive] [First] [Previous] [Next] [Last] [Exit]					

The **top section** of the Work Item Data screen displays the Work Item Number, along with identifying information about the building for the work item. You cannot change this information.

The **second section** displays funding and planning information about the work item and indicates whether the work item is part of a project. You can update much of this information, although some is determined automatically or transferred from elsewhere in the Work Item System. Once the Desired Completion Date is supplied, you cannot change it. The Phase is automatically determined based on actions you take that affect the work item's status. The ASID and PCN belong to the project with which the work item is associated, although different project work items can have different ASIDs. Both ASID and

PCN are assigned through the Project Data screen.

The **third section** displays the title of the work item, a description of the work item, and comments. You can update any of this text.

The **bottom section** includes buttons that allow you to carry out various work item operations, move among the selected work items, and exit from the Work Item Data screen.

The following sections describe how to view, create, edit, and archive work items.

### **7.1.1 Select Work Items to View**

Although the Work Item Data screen displays a single work item at a time, you may specify a list of several work items and move among them. When you click **Search** on the Work Item Data screen, the Work Item Search screen is displayed, as shown in Exhibit 7-2.

If you are looking for a particular work item, enter identifying information that will lead you to that work item. You can use the work item number, the building, or any text you remember from the title or description of the work item. If you need to see all work items sharing certain characteristics, you can specify whatever information will help you find them.

**NOTE:** If you specify criteria that uniquely identify a building in one of the building fields, only corresponding information will be available for selection in the other building fields.

When you click **Search**, IRIS will search for work items matching your criteria. If any work items match, you will be returned to the Work Item Data screen with the first matching work item

displayed.

If no work items match, you will be notified. Use the **Clear** button to get rid of search criteria you don't want and start over.

## EXHIBIT 7-2

### Work Item Search Screen

The screenshot shows a software window titled "Work Item Search". At the top, there is a menu bar with "File" and "Help". Below the menu bar, there are several search criteria fields arranged in rows. The first row contains "Building #:", "Name:", and "City/State:". The second row contains "Work Item #:", "Line Item:", "ASID:", and "PCN:". The third row contains "Construction Plan Year:" and "Work Category:". The fourth row contains "Phase:", "Priority:", "Regional Category:", and "Region:". Below these rows are two text input fields labeled "Work Item Title:" and "Description:". At the bottom of the window, there are three buttons: "Search", "Clear", and "Exit".

#### 7.1.2 Edit a Work Item

To edit a work item already entered in IRIS, first select the desired work item using the process described in Section 7.1.1. Once the work item to be edited is displayed on the Work Item Data screen, make the desired changes.

You cannot change the Building Number, Name, or Location, or the Work Item Number for an existing work item. Additionally, once you enter a Desired Completion Date and update the Work Item, the field is locked.



**To record your changes permanently** in IRIS, click **Update**.  
**To cancel your changes** and leave the work item as it was, click **Cancel**.

**To exit the Work Item Data screen**, click **Exit**. If you have made changes to the current work item and not clicked the **Update** button, you will have the chance to record the update permanently or cancel the changes.

### **7.1.3 Create a New Work Item**

From the Work Item System menu, click **Work Items** to bring up a blank Work Item Data screen. Click **Add**, and use the Select a Building screen to specify the building for the new work item. For more information on selecting a building, see Section 5.5, Searching for a Building.

***Don't just start typing on the blank Work Item Data screen! Any information you type will be lost. You must click Add and select the building first.***

After you select the building, you will see a new Work Item screen, with the building identifying information filled in, as well as the following entries:

- The Phase defaults to “I” (Inventory)

- The Non-Recurring check box is selected.

You must supply the required data, which includes:

- Budget Activity
- Work Category
- Construction Plan Year
- Estimated Current Construction Cost (should typically be \$10,000 or above)
- Title
- Description.

The Design Plan year is also required, but is filled in with a default based on the Construction Plan Year if you do not supply it.

Fill in as much of the rest of the information as you wish, then click **Transmit** to record the work item permanently in IRIS. **To cancel the new work item, click Cancel.**

If you do not supply the required data before you try to select another work item or exit the screen, you will see error messages letting you know what information is needed. Similar error messages will appear if you enter invalid information.

#### **7.1.4 Archive a Work Item**

A work item is archived if it is no longer active. Usually, a work item is archived when the project it is associated with is archived. However, a work item that is never associated with a project can be

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archived on its own.

A work item can be archived individually only if it is not part of a project. Work items that are attached to projects can be archived with the project; if you need to archive a project work item individually, remove it from the project and then archive it.

**To archive an individual work item**, click **Search** and display the work item you want to delete, then click **Archive**. The work item is transferred to the archive, and is no longer available to be associated with a project. A work item archived on its own has its phase set to "X", or canceled. The work item will remain available for viewing until you select another set of work items or exit the screen.

**To archive a work item along with its project**, archive the project. Go to the Project Information screen, click **Search** and select the project of interest, then click **Archive**. A work item that is archived with a project keeps the last phase that it had when it was active.

View archived work items either through the Work Item archive or the Project archive. For more information, see Chapter 9.0, Work Item and Project Archives.

## **7.2    PROJECT DATA**

To work with projects in the Work Item System, click on the **Projects** button on the Work Item System menu. The Project Data screen, as shown in Exhibit 7-3, will appear. This section describes the following functions which are available from the Project Options window:

- Edit a current project.
- View and edit project schedule.

- Add work items to a project or remove work items from a project.
- Delete a project.
- Archive a project.
- View or edit a project work item.
- Work with Project Managers.
- Generate a Project Authorization form.
- Transfer the project to Project Manager's Toolbox (PMT) to be tracked there.
- Create a new project.

### EXHIBIT 7-3 Project Data Screen

Project Data				
File Edit Schedule Managers Work Items Report PMT Help				
Project		PCN	Phase	Desired Completion
FRC BG 100, 9700 PAGE, OVERLAND, MO		IMO02010	C	03/24/1995
Supervision		Managers		Comments
Authorized Amount: \$36,513.75 Actual Amount:				NARA COMPUTER ROOM
Design		Percent Complete: 100%		
Authorized Amount: \$0.00 Actual Amount: \$26,900.00		Estimated Start: 08/26/1994	Estimated Completion: 03/22/1995	
		Actual Start: 08/26/1994	Actual Completion: / /	
Construction		Estimated Completion: 09/30/1996		
Authorized Amount: \$1,160,406.00 Actual Amount: \$1,166,213.59		Estimated Award: / /	Actual Completion: / /	
		Actual Award: / /	Substantial Completion: 07/30/1996	
		Final Acceptance: / /		
Project Work Items Double Click On A Work Item To View				
Building Number	ASID	BA	Title	Description
MO0551AG	A0001634	80	NARA STACK VENTILATION 4TH FLR	INSTALL STACK VENTILATION SYSTEM
MO0551AG	VM088552	55	NARA COMPUTER ROOM	BUILDOUT OF THE OLD ARMY COMPU
MO0551AG	VM088552	55	STACK VENTILATION	REPLACEMENT OF THE STACK AREA
<div> <div></div> <div></div> </div>				
<div> <div>Search</div> <div>Add</div> <div>Update</div> <div>Delete</div> <div>Archive</div> <div>Schedule</div> <div>Managers</div> <div>Work Items</div> <div>Print PA</div> <div>PMI</div> <div>Exit</div> </div>				

#### 7.2.1 Project Data Screen

To view a project, click **Search** and select it using the process described in Section 7.2.2. To create a new project, click **Add** and follow the process described in Section 7.2.3.

The project name and PCN (Project Control Number) cannot be changed after the project is created. The project Phase is determined automatically based on other information and actions. You cannot change it directly. Once a Desired Completion Date has been entered, the field will be locked. No further modifications to the field will be

permitted.

Some information can be updated directly by typing in the relevant fields. These include:

- Comments
- Supervision Authorized Amount, Supervision Actual Amount
- Design Actual Amount, Estimated Start, Actual Start, Percent Complete, Estimate Completion, Actual Completion
- Construction Actual Amount, Estimated Award, Actual Award, Estimate Completion, Actual Completion, Substantial Completion, and Final Acceptance.

The summary schedule dates here are reflected on the Project Schedule screen. If the dates are changed on that screen, the dates shown here will change as well, and vice versa.

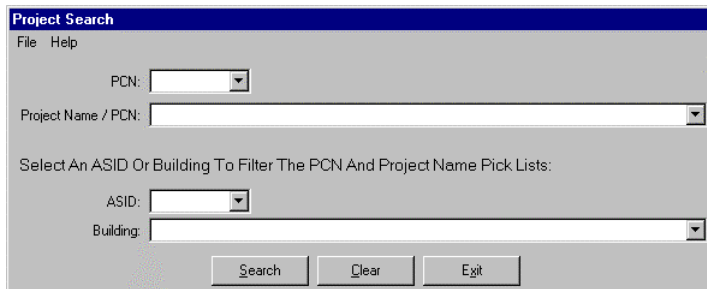
Project managers and project work items are updated via separate options accessible by clicking the relevant button at the bottom of the Project Data screen.

### **7.2.2 Select a Project to View**

Only one project can be displayed at a time. To select a project to view or update, go to the Project Data screen and click **Search**. You will see the Project Search screen, as shown in Exhibit 7-4. Select the project either by PCN or by Project Name, using the pulldown selection arrows on those fields. You can limit projects displayed to one ASID and/or one building number.

Specify the project you want, then click **Search**. You will return to the Project Data screen with data showing on the project you selected.

## EXHIBIT 7-4 Project Search Screen



### 7.2.3 Create a New Project

To create a new project, click **Add**. *Don't just start typing on the Project Data screen! Any information you type will be lost. You must click Add first.*

After you click **Add**, you will see a blank Project Data screen, with the Project Title and PCN fields available for data entry (along with the rest of the project information fields).

Fill in these entries and any others you want to supply, then click **Transmit** to record the project permanently. The Project Title and PCN fields are the only fields required to create a project record. Once the project has been transmitted, you cannot change the Project Title or PCN.

To cancel the new project, click **Cancel**.

### 7.2.4 Project Work Items

Nearly all projects have work items associated with them. The project's work items are the activities that are brought together to be

funded, scheduled, and executed as the project. Summary information on the project's work items is displayed in the lower portion of the Project Data Screen. You can:

- View complete information on any of the project work items.
- Add work items to the project.
- Remove work items from the project.

**To view complete information on any of the project work items**, double-click the summary line for that work item. The Work Item Data screen will appear, displaying data on the work item you selected. You can view and change any of the information. Return to the Project Data screen by clicking **Exit**.

**To add or remove work items from the project**, click **Work Items**. This will display the Project Work Items screen, as shown in Exhibit 7-5.



## EXHIBIT 7-5

### Project Work Items Screen

The screenshot shows a software window titled "Project Work Items". It has a menu bar with "File" and "Help". Below the menu bar, there is a label "Project Work Items" and a text box "ASID For New Project Work Item:" with the value "A0311744".

The "Project Work Items" table has the following data:

Building Number	Work Item	ASID	BA	Title	Description
KS0075ZZ	0095	A0311744	80	DOCK ENCLOSURE	THE POST OFFICE RE

Below this table is a horizontal scrollbar. Below the scrollbar is a label "Available Work Items" and a text box "Click On A Project Work Item To Select".

The "Available Work Items" section has a "Building # =" dropdown menu with "KS0075ZZ" selected and a "Work Category =" dropdown menu. Below these are two tables:

Building Number	Work Item	BA	Title	Description
KS0075ZZ	0088	54	SEISMIC PROTECTION (95)	A STUDY CONDUCTED BY LEO A
KS0075ZZ	0094	54	STUDY-FULL SEISMIC ANALYSIS	A LIMITED SEISMIC STUDY (LSS)
KS0075ZZ	0099	80	NEW RAMP AT POST OFFICE DOCK	THE POSTAL SERVICE HAS PROV

Below the second table is a horizontal scrollbar. Below the scrollbar is a label "Click On An Available Work Item To Select".

At the bottom of the window are five buttons: "Select ASID", "Add", "Remove", "Clear", and "Exit".

The upper portion of the screen lists the work items associated with the project. The lower portion of the screen lists work items that are available to be associated with the project (the pool of available work items).

**To add a work item to the project**, select the work item of interest in the **Available Work Items** list, select an ASID for the new work item (it appears in the **ASID for New Project Work Item** box), then click **Add** and confirm the addition.

You can limit the available work items displayed in order to make selection easier. Use the **Building #** pulldown to limit the list of work items to those available for a single building. Use the **Work Category** pulldown to limit the list of work items to those available in a single category. Click **Clear** to remove the limitations and display the entire list of available work items.

A work item can only be part of one project. Adding a work item to a project removes it from the pool of available work items.

**To select an ASID for the new work item**, you can either use the ASID of another work item in the same project or generate a new one. You may not use the same ASID for project work items with different Budget Activity codes.

The ASID you select or generate will appear in the **ASID for New Project Work Item** box. If you are adding the first work item to a project, you must select the ASID before adding the work item.

- To use an existing project ASID, click any project work item that has the ASID you want. That ASID will appear in the **ASID for New Project Work Item** box.
- To generate a new ASID or to use an ASID from another project, click **Select ASID**. This displays the **Work Authorization Number Generation and Tracking** screen. You may select an existing ASID on the **Issued WAN Numbers** tab or generate a new one on the **Issue New WAN Number** tab.

**NOTE:** If you are adding the first work item to a project, you must select or generate the ASID first. Click **Select ASID**, then generate a new ASID or select an existing one, then click **EXIT** on the **Work Authorization Number Generation and Tracking** screen to return to the Project Work Items screen. The ASID will be displayed in the **ASID for New Project Work Item** box.

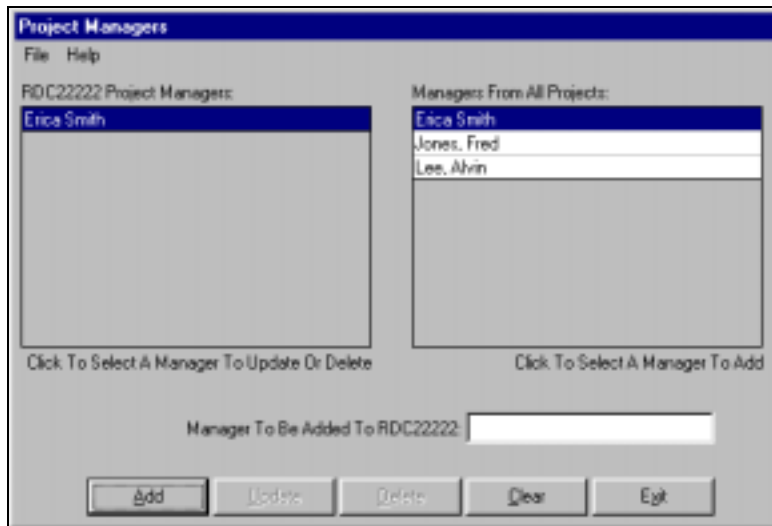
**To remove a work item from the project**, select the work item you want to remove in the list of Project Work Items, then click **Remove** and confirm the action. When a work item is removed from a project,

it is returned to the list of Available Work Items.

### 7.2.5 Project Managers

The list of managers for a project is displayed on the Project Information screen. To edit or update this list, click **Managers**. This displays the Project Managers screen, as shown in Exhibit 7-6.

**EXHIBIT 7-6**  
**Project Managers Screen**



The managers currently associated with this project are listed in the box on the left; all managers for any project are listed in the box on the right. You can:

- Associate an existing manager with this project.
- Add a new manager to this project.
- Remove a manager from this project.
- Update the spelling of an existing manager's name.

Depending on which of these tasks you are doing, the buttons at the bottom of the screen may change.

**To add an entirely new manager** to this project, enter the name in the lower box on the right, then click **Add**. This adds the new manager to the both the project list and to the list of available managers.

**To add an existing manager to this project**, click on the manager in the right-hand box, then click **Add**. Click **Clear** instead if you change your mind. You can edit the name before clicking **Add**.

If you edit the name selected from the right-hand box and add the new name to your project, this adds the updated manager name to both the project manager list and to the list of available project managers. Be careful, because you may add duplicate manager names with slightly different spelling in this manner.

**To delete a manager from this project**, click on the manager in the left-hand box, then click **Delete**. Click **Clear** instead if you change your mind.

**To update a manager on this project**, click on the manager in the right-hand box, update the manager's name in the lower box on the right, then click **Update**. The manager listed in the project manager list on the left is updated to match your changes, and the new manager name is added to the list of available project managers. **To cancel the process**, click **Clear** rather than **Update**.

When you are done adding, deleting, and updating managers, click **Exit** to return to the Project Information screen.

#### **7.2.6 View and Edit Project Schedule**

Major project schedule dates are displayed on the Project Data screen. More detailed information is available on the Project Schedule screen, as shown in Exhibit 7-7. Click **Schedule** to view the Project Schedule screen.

**EXHIBIT 7-7**  
**Project Schedule Screen**

Project		PCN	Phase	Decided Completion
Project One		R0C11111	C	04/12/1997

Design		Start Design Planned	Start Design Actual
Select A/E Planned	11/11/1997	11/12/1997	11/10/1997
Select A/E Actual	12/08/1997		
Request A/E Proposal Planned	12/12/1997	Review Preliminary Design Planned	
Request A/E Proposal Actual		Review Preliminary Design Actual	
Negotiate A/E Fee Planned		Review Intermediate Design Planned	
Negotiate A/E Fee Actual		Review Intermediate Design Actual	
Award A/E Order Planned		Accept Final Design Planned	11/11/1997
Award A/E Order Actual		Accept Final Design Actual	12/16/1997

Construction		Start Construction Planned	Start Construction Actual
Bid Invitation Planned			
Bid Invitation Actual			
Bid Opening Planned		Complete Construction Planned	04/02/1998
Bid Opening Actual		Complete Construction Actual	04/01/1998
Award Construction Planned	12/25/1997	Final Acceptance Planned	
Award Construction Actual	12/26/1997	Final Acceptance Actual	04/12/1998
Issue Notice To Proceed Planned		Capitalization	Substantial Completion
Issue Notice To Proceed Actual			03/12/1998

Leased Buildings		Negotiate Lessor Proposal Planned	Negotiate Lessor Proposal Actual
Request Lessor Proposal Planned	01/12/1997		
Request Lessor Proposal Actual			
Review Lessor Proposal Planned			
Review Lessor Proposal Actual			11/12/1997

Update Exit

Information that is displayed on both screens is kept in synch. In other words, if you change a major scheduled date on the Project Data screen, the change is reflected on the Project Schedule screen and vice versa.

You must click **Update** to make your changes permanent. If you click **Exit** without updating, you are given the choice of recording your changes or discarding them.

**NOTE:** For prospectus-level projects sent to the Project Manager's Toolbox (PMT), a companion system to IRIS,

detailed project cost and schedule information is maintained by PMT and viewed from this screen. The dates on this screen will reflect PMT information.

### **7.2.7 Generate a Project Authorization**

To generate a Project Authorization for the current project, click **Print PA**. You can confirm or cancel the action. If you confirm, a Project Authorization form for the project will automatically be generated, and the phase will be changed to Design.

**NOTE:** The Project Authorization can be printed at any time. If the project's phase is "I", the project phase and the phase of all of the associated Project Work Items is changed to "D" (Design). If the project has already been authorized, you can still print a reference copy of the Project Authorization form.

### **7.2.8 Transfer to PMT**

**To transfer tracking and responsibility for a project to PMT**, click **PMT** and confirm the action. Projects that have been transferred to PMT can be viewed through IRIS, but not updated.

You can leave IRIS and move directly to PMT by selecting **Exit to PMT** from the **File** menu on the IRIS Main Menu screen.

### **7.2.9 Archive a Project**

**To archive a project**, first click **Search** and select the project to be archived so that it is the current project on the screen. Then click **Archive**, and confirm the action. Archiving a project automatically archives any project work items. Archive projects when they are completed or abandoned. If a project is never funded, and there is no need to view project data again, delete the project rather than archiving it.

View archived projects using the Project Archive option. For more information, see Section 9.1, Project Archive.

#### **7.2.10 Delete a Project**

**To delete a project**, first click **Search** and select the project to be deleted so that it is the current project on the screen. Then click **Delete**, and confirm the deletion. Deleting a project returns any project work items to the available pool. Generally a project should be deleted only if it was never funded or undertaken. A completed project should be archived.

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## **8.0 WORK ITEM SYSTEM REPORTS**

Several Work Item System reports are available. Most include data on work items. The amount of information included for each work item depends on the report, with the Work Item Detail report containing the most information and the Building Summary report the least.

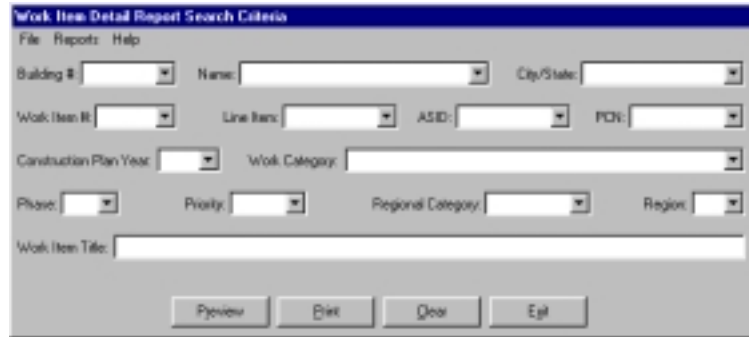
- To view a number of work items in complete detail, choose the **Work Item Detail** report.
- For a fairly detailed picture of work in a building, choose the **Building Detail** report.
- For a quick overview of a building on a few pages or screens, choose the **Building Summary** report.
- The **Project Detail** report concentrates on projects, and includes project status and an intermediate level of work item information. All projects containing work items for the building you specify are included, as well as all projects for work items you select if no building is specified.
- The **Fiscal Year** summary includes summary financial information for all available fiscal years.

All reports except the Fiscal Year summary require you to select data. The Fiscal Year summary includes summary data for the current fiscal year. The same search criteria screen is used for all the other reports. The example in Figure 7-1, Work Item Detail Report Search Criteria is typical. Notice that the criteria are very similar to those on the Work Item Search screen.

Reports can be previewed on the screen or printed. Clicking

**Preview** shows the report precisely as it will be printed. It's a good idea to preview the report on screen before printing, because some sets of search criteria will produce blank reports or data you do not expect.

### EXHIBIT 8-1 Work Item Detail Report Search Criteria



The search criteria you specify are applied differently depending on the report you choose. Essentially, any work item matching any of the criteria you specify is included. That may mean including certain buildings in the Building Detail report, or certain projects in the Project Detail report. If you specify an ASID for the Project Detail report, you will see projects under that ASID. If you supply building-related criteria for the Building Detail report, you will see data for the buildings you specify.

In Preview, only the first page of the report is displayed at first. If the page number displayed at the top of the report includes a +, i.e., if the page number looks like **1 of 1+**, there are more pages to view. Use the arrow buttons at the top of the screen to move forward or backward through the pages of the report.

You can scroll to see parts of the report that don't fit on the screen in the current view, or use the zoom button in the top row to magnify or shrink your view of the report page.

If the report does not include the data you expect, exit from the report, click **Clear** and apply a new set of criteria. You can also select a different report entirely. Do this either by pulling down the **Reports** menu on the **Report Search Criteria** screen and selecting a new report, or by clicking **Exit** and selecting a new report from the **Work Item System** menu.

Sample reports are shown in Appendix B, Sample Reports.

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## **9.0 WORK ITEM AND PROJECT ARCHIVES**

Work items and projects are archived when they are complete but there is still a need to view the data. A work item can be archived as part of the project it is associated with, or on its own. For directions on archiving a work item, see Section 7.1.4. For directions on archiving a project, see Section 7.2.9.

Archived projects and work items are stored and viewed separately from active ones. Searching for and displaying archived work items and projects is very similar to searching for and displaying active work items and projects. The main differences are:

- When you search the archives, only archived work items and projects meeting your criteria are found.
- You cannot change any information on archived work items and projects.

### **9.1 PROJECT ARCHIVE**

**To view an archived project**, go to the Work Item System Main Menu (Exhibit 6-1) and click **Project Archive**. The Project Archive screen is similar to the Project Information screen, with some options missing that are irrelevant to archived projects.

You can view one archived project at a time. **To view an archived project**, click **Search** to select the project you want to display. The Archived Project Search screen is nearly identical to the Project Search screen, as shown in Exhibit 7-4, except that only archived projects are available. For more information on searching for a project, see Section 7.2.2.

**To view the archived project schedule**, click **Schedule**. This

displays the schedule, frozen as of the date the project was archived. The Archived Project Schedule screen is virtually identical to the Project Schedule screen, as shown in Exhibit 7-7. Click **Exit** to return to the Archived Project screen.

**To view an archived project work item** associated with the archived project you are viewing, double click on the summary line for that work item. The Work Item Archive window described in Section 9.2 with the selected work item will be displayed. Click **Exit** to return to the Project Archive screen.

## **9.2    WORK ITEM ARCHIVE**

A work item may be archived in either of two ways. It can be canceled while not associated with a project (either before being associated with any project or after being removed from a project), or it can be archived along with its associated project if the project is archived. Refer to Section 9.1 for instructions on viewing an archived Project Work Item from its associated archived project.

**To view archived work items**, move to the Work Item System Main Menu (Exhibit 6-1) and click **Work Item Archive**. The Work Item Archive screen is similar to the Work Item Data screen, with some options missing that are irrelevant to archived work items.

Click **Search** and specify criteria for the archived work items you want to view. The Archived Work Item Search screen is nearly identical to the Work Item Search screen as shown in Exhibit 7-2, except that only archived work items are available. For more information on searching for work items, see Section 7.1.1.

If your criteria result in more than one work item being selected, use the **First**, **Next**, **Last**, and **Previous** buttons to view them all. **To return to the Work Item System menu**, click **Exit**.

**A Phase of “X” (Canceled) indicates that a work item has been canceled and is not associated with a project. Work items archived with their projects retain the phase they had when the project was archived.**

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## **10.0 WORK ITEM SYSTEM STEP-BY-STEP INSTRUCTIONS**

This chapter gives step-by-step instructions for carrying out common actions in the Work Item System. You can view these instructions on the screen, using the IRIS Help system. From the Help menu, select **IRIS Help Topics**, then choose "How to..." for the action you want. A small narrow Help window containing the directions will display on top of the application, allowing you to see IRIS and the directions simultaneously.

### **To create a work item:**

1. Go to the Work Item screen.
  2. Click the **Add** button. This brings up the Select a Building window.
  3. Select the building for the work item.
  4. Click **Select**. This returns you to the Work Item screen.
  5. Complete the required fields and any other fields you wish to add now.
  6. Click the **Transmit** button to send the new work item to the central database.
-

**To create a project:**

1. Go to the Project Data screen.
  2. Click the **Add** button.
  3. Complete the required fields (Project Number, PCN, ...) and any other fields you wish to add now.
  4. Click the **Transmit** button to send the project data to the central database.
- 

**To add work items to a project:**

1. Go to the Project Data screen.
  2. Search and select the project you want to add the work items to.
  3. Click the **Work Items** button. The Project Work Items window appears.
  4. If desired, use the pulldown menus to specify a building or a category of work item to display.
  5. Scroll the list of available work items until the one you want appears.
  6. Click on the desired work item.
  7. Select an ASID for new the work item (either click an existing project work item to use its ASID or the **Select ASID** button to select one from another project or create a new one).
  8. Click **Add**.
-

9. When you have added all the work items you want, click **Exit**.

---

**To remove a work item from a project:**

1. Go to the Project Data screen and select the project.
2. Click the **Work Items** button. The Project Work Items window appears.
3. Scroll the list of project work items until the one you want appears.
4. Click on the work item.
5. Click **Delete**. The work item will be returned to the pool of available work items.
6. When you have deleted all the work items you want to remove, click **Exit**.

---

**To move a work item to a different project:**

1. Go to the Project Data screen and select the project you want.
2. Click the **Work Items** button. The Project Work Items window appears.
3. Scroll the list of project work items until the one you want appears.
4. Click on the work item.
5. Click **Delete**. The work item will be returned to the pool of available work items.

6. When you have deleted all the work items you want to remove, click **Exit**.
  7. Click **Search** and select the new project.
  8. Click the **Work Items** button. The Project Work Items window appears.
  9. If desired, use the pulldown menus to specify a building or a category of work item to display.
  10. Scroll the list of available work items until the one you want appears.
  11. Click on the desired work item.
  12. Select an ASID for new the work item (either click an existing project work item to use its ASID or the **Select ASID** button to select one from another project or create a new one).
  13. Click **Add**.
  14. When you have added all the work items you want, click **Exit**.
-

**To archive a project:**

1. Go to the Project Data screen.
  2. Search and select the project you want to archive.
  3. Click the **Archive** button.
  4. Click the **OK** button when asked to confirm the archiving action.
  5. All work items will be archived with the project.
- 

**To archive a work item:**

**NOTE:** Work items that are part of an archived project are automatically archived.

1. Remove the work item from any project it is part of.
  2. Go to the Work Item Data screen.
  3. Search and select the work item you want to archive.
  4. Click the **Archive** button.
  5. Click the **OK** button when asked to confirm the archiving action.
-

**To delete a project:**

1. Go to the Project Data screen.
2. Search for and select the project you want to delete.
3. Click the **Delete** button.
4. Click the **OK** button when asked to confirm the deletion.
5. All work items will be removed and returned to the pool of available work items.

## **11.0 WORK AUTHORIZATION NUMBERING SYSTEM**

The Work Authorization Numbering System (WANS) component of IRIS exists to enable users to create and track Reimbursable Work Authorization (RWA) and Intra-Budget Activity Authorization (IBAA) forms, and to enable users to generate WAN numbers for other purposes, including to use as ASIDs for projects and work items. Note that the RWA form included in IRIS is the form as of February 1997; as the form and the process are updated, future versions of IRIS will be updated to match. WANS contains several components:

- It allows users to generate RWAs and IBAAAs that are similar in appearance to the printed forms.
- It allows users to generate their own WAN numbers, drawing the next available number of a given type from the national pool of numbers. These numbers can be used as ASIDs for projects and project work items.
- It allows users to track work in progress and activity under each WAN.

Users creating or selecting ASIDs for work items and projects will access the WAN generation/selection screen of WANS through the Work Item System, while other users who create and track RWAs and IBAAAs will access WANS directly.

### **11.1 WORK AUTHORIZATION SEARCH**

To find, view, and track existing RWA/IBAAAs, click **RWA/IBAA Search** on the WANS menu. This displays the RWA/IBAA Search screen, as shown in Exhibit 11-1, which allows

users to specify search criteria that may match one or many forms.

To view RWA/IBAAs, enter search criteria. Users can easily view all work in progress for a given building or agency by specifying that building or agency. To view a single form, enter that form's WAN number.

### EXHIBIT 11-1 RWA/IBAA Search Screen

The screenshot shows a software window titled "RWA / IBAA Search". Inside the window, there is a menu bar with "File" and "Help". Below the menu bar, there are several input fields arranged in a grid-like fashion. The first row contains "Work Authorization Number:" followed by a dropdown arrow and "RWA / IBAA:" followed by a dropdown arrow. The second row contains "Building Number:" followed by a dropdown arrow and "Building Name:" followed by a text input field. The third row contains "Building City:" followed by a dropdown arrow and "Building State:" followed by a dropdown arrow. The fourth row contains "Agency Bureau Code:" followed by a text input field. The fifth row contains "Field Office:" followed by a dropdown arrow and "RWA/IBAA Expiration Date:" followed by a date input field (formatted as \_\_/\_\_/\_\_). The sixth row contains "Status Code:" followed by a dropdown arrow. At the bottom of the window, there are three buttons: "Search", "Clear", and "Exit".

Partial search criteria are accepted. For example, to view all A-type RWAs, enter an "a" in the WAN field.

**To find matching forms**, click **Search**. If any RWA/IBAAs match the specified search criteria, the Work In Progress Control screen will open, displaying summary information on all matching RWA/IBAAs.

If no RWA/IBAAs match, click **Clear** to remove all search criteria, and try a less restrictive set. To view all RWAs and all IBAAs,



click **Search** without entering criteria. This may take a while.

## **11.2 WORK IN PROGRESS CONTROL**

The Work In Progress Control screen, as shown in Exhibit 11-2, allows users to view and update summary information on a set of RWA/IBAA's, to access full versions of any RWA/IBAA's displayed, to print or preview on the screen the standard IBAA or RWA form for any displayed RWA/IBAA.

Users specify the set of RWA/IBAA's to view using the RWA/IBAA Search screen. See Section 11.1, Work Authorization Search, for instructions on searching and specifying RWA/IBAA's.

**NOTE:** Users do not access this screen directly; it does not appear on any menu. It appears if a user's search criteria match any RWA/IBAA's. To access this screen, select **RWA/IBAA Search** on the WANS menu.

## EXHIBIT 11-2

### Work In Progress Control Screen

**Work In Progress Control**

File Edit Help

WAN Number	Agency / Bureau Code	Estimate Complete	Estimate Receipt	Approved To Finance	Start Date	Completion Date	Estimated Cost	Type
C0000971	0019				05/12/1997	06/12/1997	0.00	RWA
C0001174	0020				12/12/1996		0.00	RWA
F0001187	0019				12/29/1997		0.00	RWA
N9000532	0003				06/01/1997	07/01/1997	333.00	IBAA
N9000545	0020						33.00	IBAA
N9000558	1314						333.00	IBAA
N9000561	0052						0.00	IBAA
N9000587	0009						0.00	IBAA
N9000590	0000						0.00	IBAA
N9000603	0052						0.00	IBAA
N9000613	0019						0.00	IBAA
N9000639	0051						0.00	IBAA
N9000642	4805						0.00	IBAA

Double Click To Edit Form

WAN Number: 
 Status: 
 Estimate Complete: 
 Estimate Receipt: 
 Approved For Transmittal To Finance:

Remarks:

RWA

The grid at the top of the screen displays information about any RWA/IBAAs that matched the search criteria. Information includes:

- Agency/Bureau code for the requesting agency
- Requesting agency's desired start and completion dates for the work
- Estimated cost

- Whether the item is an RWA or an IBAA
- Tracking dates (dates when the estimate is complete, received, and sent to Finance)

Of this information, the tracking dates can be updated on this screen; the others must be updated on the full IBAA or RWA form screens.

The bottom portion of the screen displays tracking dates, comments, and identifying information about the selected RWA/IBAA, including whether the selected item is an IBAA or an RWA. Use this bottom portion to update the information.

**To enter the tracking dates or make a comment on an IBAA or RWA**, select the desired RWA/IBAA by clicking on it in the upper grid. Information on that RWA/IBAA will fill the bottom part of the screen. Type any changes you want to make, then click **Update** to record your changes permanently.

**To view or update the full RWA/IBAA**, double-click the RWA/IBAA in the upper grid. The IBAA or RWA form will appear, and you may edit it. Click **Exit** on the IBAA or RWA screen to return to the Work In Progress Control screen.

**To print an IBAA or RWA form**, select the desired RWA/IBAA by clicking on it in the upper grid, then click **Print**.

**To preview an IBAA or RWA** on the screen as it will appear when printed, select the desired RWA/IBAA by clicking on it in the upper grid, then click **Preview**. You may print the form you are previewing by clicking the printer icon that appears on the preview screen.

Click **Exit** to return to the RWA/IBAA Search screen.

### **11.3 WORK AUTHORIZATION NUMBER GENERATION**

## **AND TRACKING**

The Work Authorization Number Generation and Tracking screen, as shown in Exhibits 11-3 and 11-4, allows users to work with WANs. Users can assign WANs directly, and find the work items and projects that use a given WAN. All WANs numbers for a region appear on the tracking screen, including those:

- Generated while creating RWAs and IBAs
- Generated to assign to project work items as ASIDs
- Requested directly for other purposes.

To access the WAN Generation and Tracking screen directly, click **WAN Number Generation and Tracking** on the WANs menu.

There are two tabs on the screen, the **Issue New WAN Number** tab and the **Issued WAN Numbers** tab. Click on the desired tab to expose that portion of the screen.

### **11.3.1 The National WAN Server**

With the advent of IRIS, users can request WANs numbers directly, rather than working with a regional contact who requests numbers in groups and assigns them to users. When a user requests a WAN for any purpose, a central computer that maintains a nationwide list of available WANs (the national WANs server) is contacted and the next available WAN of the requested type and format is assigned, on the spot. Regions will never run out of WANs again.

### **11.3.2 Obtaining a New WAN**

**To obtain a new WAN, click Issue New WAN Number.** Users who ask to assign an ASID for a new project work item will be brought to this screen automatically, with the **Issue New Wan Number** tab exposed.

### EXHIBIT 11-3

#### Work Authorization Number Generation and Tracking Screen; Issue New WAN Number Tab Exposed

IRIS Work Authorization Numbering System

**Work Authorization Number Generation And Tracking**

File Help

**Issue New WAN Number** Issued WAN Numbers

New Work Authorization Number:

Select The Type Of Work Authorization Number To Generate:

**RWA:**

- ☐ A Type (Reimbursable Non-Prospectus Alterations and Major Repair)
- ☐ B Type (Reimbursable Prospectus Alterations and Major Repair)
- ☐ C Type (Reimbursable Recurring Cooperative Use)
- ☐ D Type (Reimbursable Non-Recurring Cooperative Use)
- ☐ E Type (Reimbursable Disaster Assistance)
- ☐ F Type (Reimbursable Open-End Agreements)
- ☐ N Type (Reimbursable Non-Recurring)
- ☐ R Type (Reimbursable Recurring)

**ASID:** State For ASID:

- ☐ I Type (R&A Prospectus Non-Line-Item)
- ☐ N Type (New Construction)
- ☐ R Type (R&A Non-Prospectus Non-Line-Item)
- ☐ S Type (R&A Prospectus Advance Design)
- ☐ V Type (R&A Prospectus Line-Item)
- ☐ W Type (R&A Non-Prospectus Line-Item)

**Other:**

- ☐ R8 Type (Cooperative Use)
- ☐ T Type (Transfer)

Click the WAN type desired, then click **OK** to generate the WAN or **No** to cancel generation. The next available WAN of the requested type will be assigned and displayed in the **New Work Authorization Number** box at the upper right.

**When creating an ASID**, make sure to specify the correct state. Use the pulldown next to the ASID selection to specify the state. The ASID will be created for the state that is displayed.

Click **Exit** to return to the previous screen, either the WAN System menu or the Project Work Items screen.

Click **Clear** to remove the WAN type specification.

### 11.3.3 Tracking Existing WANs

Use the **Issued WAN Number** tab to track and view WANs in use. Users can view a list of issued WANs, along with the projects and buildings and work items using that WAN.

#### EXHIBIT 11-4 Work Authorization Number Generation and Tracking Screen; Issued WAN Numbers Tab Exposed

**Work Authorization Number Generation And Tracking**

File Help

Issue New WAN Number      **Issued WAN Numbers**

Selected Work Authorization Number: 80000968

Work Authorization Numbers

Region	WAN	RWA	IBAA	Active
6	A0001048			Yes
6	A0001145			Yes
6	B0000939			Yes
6	B0000942			Yes
6	B0000955			Yes
6	80000968	On File		Yes
6	B0001077			Yes
6	B0001093			Yes
6	B0001106			Yes
6	C0000971	On File		Yes
6	C0000997			Yes
6	C0001000			Yes
6	C0001051			Yes
6	C0001116			Yes
6	C0001158			Yes

Active Projects With Selected WAN

PCN	Title
AIA51431	H.HOOVER LIBRARY, 219 S DOWNEY

Buildings / Work Items With Selected WAN

Building	Work Item	BA	Title
IA0006ZZ	1000	51	Relplace Post office fac
IA0013ZZ	1000	51	Clear benches of debris

Click On A WAN Number To Select

Exit

When the **Issued WAN Number** tab is opened, the list displays all issued WANs for the region. Users may scroll to see additional WANs. Data displayed includes whether the WAN has an associated IBAA or RWA, and whether the WAN is currently active.

To view a list of buildings, projects, and work items using a WAN, click on the WAN of interest in the list. The selected WAN is highlighted, and if any buildings, projects, or work items use that WAN, they are displayed in the lists on the right.

Click **Exit** to return to the WAN System menu.

#### **11.4 INTRABUDGET ACTIVITY AUTHORIZATION (IBAA)**

Users can generate new IBAA's or view and update existing IBAA's. The IBAA form in IRIS is designed to replicate the paper form closely, although the different sections are on separate tabs rather than on different parts of a single sheet of paper. IBAA's printed from IRIS are nearly identical to current paper IBAA's.

**To generate a new IBAA**, click **New IBAA** on the WAN System Menu. For more information see Section 11.4.1, Generating a New IBAA.

**To view and update existing IBAA's**, click **RWA/IBAA Search**, and specify search criteria. If a single IBAA matches the criteria, it will be displayed immediately. If more than one IBAA matches, the Work In Progress Control screen is displayed and users can double-click the desired IBAA to display it for viewing or editing. For more information on the RWA/IBAA Search screen, see Section 11.1, Work Authorization Search. For more information on the Work in Progress Control screen, see Section 11.2, Work in Progress Control.

The IBAA consists of four sections. To view a particular section of the IBAA, click the tab for that section. The desired section will be exposed to view. The sections are:

- Section I: Funding Organization Authorization

- Section II: Estimate by Accomplishing Organization
- Section III: Funding Organization Approval
- Section IV: Accomplishing Organization Work Completion Certification

Information on the sections and their data is in Section 11.4.2, IBAA Information.

**To preview an IBAA** on the screen as it will be printed, click **Preview**. Use the scroll bars to view all portions of the IBAA. To print the IBAA while previewing, click the printer icon on the preview screen. To change the view size of the preview, click the rightmost button in the top row of the preview screen. **To close the preview and return to the IBAA screen**, click the X in the upper right-hand corner of the preview screen.

**To print an IBAA**, click **Print**. To set printing options, pull down the **File** menu on the IRIS Main menu, and select **Print Setup**. Users may print to a Windows printer or to a file.

**To delete an IBAA**, click **Delete**.

**To return to the previous screen**, either the Work In Progress Control screen or the WAN System menu, click **Exit**. Users will be prompted to transmit data on new IBAA's if they have not done so yet. Users will be prompted to update the IBAA if they have changed any information on an existing IBAA without clicking **Update**.

#### **11.4.1 Generating a New IBAA**

**To generate a new IBAA**, click **New IBAA** on the WAN system menu. This displays the IBAA screen, with **Section I** exposed. Click **Add** to open a new IBAA. *Don't just start typing!* All



information typed into the IBAA form will be lost. Users must click **Add** to add an IBAA.

When you click **Add**, the button changes to read **Transmit**. Click **Transmit** when you are ready to send the new IBAA to the database. You must transmit your new IBAA; otherwise it will not be recorded.

Certain information is required for an IBAA. You must generate a WAN number for the IBAA; to do so, click **Assign WAN#** on the **Section 1** tab. This button is visible only until the WAN number is assigned. After the WAN number is assigned, it is displayed in the **IBAA Number** box at the top of the screen.

#### **11.4.2 IBAA Information**

IBAA information is divided into four sections, corresponding to the sections of the paper IBAA form. Each is on its own tab. **To move to a tab**, click the tab title and that tab will be exposed to view.

**Section I - Funding Organization Authorization:** This tab holds basic IBAA identifying information, data on any related project and/or work item, and the requested start and completion dates for the work. Use this tab to request the WAN number for a new IBAA. (See Exhibit 11-5.)

## EXHIBIT 11-5

### IBAA Screen; Section I Tab Exposed

Intra Budget Activity Authorization					
Section I		Section II	Section III	Section IV	
IBAA Number: <b>N9000532</b>					
<b>SECTION I - FUNDING ORGANIZATION AUTHORIZATION</b>					
1. IBAA Number N9000532	2. Budget Activity Code 54	3. Project Number 	4. Lease Contract Number 	5. Function Code 	
6. Agency Bureau Code 0003		7. Work Item No. 	8. Project Nature (25 Characters Maximum) 		
9. Contact (Name/complete address/ZIP) 		10. Work Location (Building name and complete address) KS1394ZZ 100 W 6TH STREET 100 W 6TH STREET HOLTON, KS 66436			
11. Contact's Telephone Number ( ) -	12. Date Request Submitted 05/12/1997	13. Requested Work/Service Dates	a. Start Date 06/01/1997	b. Completion Date 07/01/1997	
14. Work Description 					
<input type="button" value="Add"/> <input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Contacts"/> <input type="button" value="Build Work Item"/> <input type="button" value="Preview"/> <input type="button" value="Print"/> <input type="button" value="Exit"/>					

Most information on this tab can be typed directly. Select a building by using the pulldown arrow next to the **Building Number** field. Select a contact by using the pulldown arrow above the **Contact** field. This will fill in any available contact information for the agency contact. To update information on a contact, use the **Contacts** button. See Section 11.6, Agency Contacts, for directions on updating contact information.

**Section II - Estimate by Accomplishing Organization:** This tab contains information on the estimated time, cost, and materials for accomplishing the requested work, and indicates the signatures of approving officials. (See Exhibit 11-6.)

## EXHIBIT 11-6

### IBAA Screen; Section II Tab Exposed

Intra Budget Activity Authorization									
File Edit Help									
									IBAA Number: <b>N9000532</b>
Section I		Section II			Section III		Section IV		
SECTION II - ESTIMATE BY ACCOMPLISHING ORGANIZATION									
Function Code	Work Hours	Labor		Materials		Other		Total Estimated Cost	16. Building Number <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
		OC	Amount	OC	Amount	OC	Amount		
333	333	11	333.00	26	0.00		0.00	333.00	
TOTAL: 333								333.00	17. Organization Code <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
Click To Edit Estimated Cost Lines									
18. Action Type <input checked="" type="checkbox"/> A - Add <input type="checkbox"/> C - Change <input type="checkbox"/> D - Delete <input type="checkbox"/> N - Completion						19. Twenty - Five Percent (25%) Limitation <div style="border: 1px solid black; width: 100px; text-align: center;">0.00</div>			
20. Typed Name and Title of Accomplishing Organization Official <div style="border: 1px solid black; height: 20px; width: 100%;"></div>						Signature <div style="border: 1px solid black; height: 20px; width: 100%;"></div>		Date Signed <div style="border: 1px solid black; width: 50px; text-align: center;">_/_/_</div>	
21. Typed Name and Title of Concurring Official <div style="border: 1px solid black; height: 20px; width: 100%;"></div>						Signature <div style="border: 1px solid black; height: 20px; width: 100%;"></div>		Date Signed <div style="border: 1px solid black; width: 50px; text-align: center;">_/_/_</div>	
Add		Update		Delete		Contacts		Build Work Item	
						Preview		Print	
								Exit	

The building number and organization code are carried over from other tabs of the IBAA, and the 25% limitation amount is determined based on other data furnished.

Cost estimate lines cannot be typed directly. Dollar cost and labor hours are automatically totaled for all lines. **To edit cost estimates**, click the large **Click to Edit Estimated Cost** button. The results are shown in Exhibit 11-7.

## EXHIBIT 11-7

### Editing IBAA Estimated Cost Lines

Intra Budget Activity Authorization									
File Edit Help									
									IBAA Number: <b>N9000532</b>
Section I		Section II				Section III		Section IV	
SECTION II - ESTIMATE BY ACCOMPLISHING ORGANIZATION									
Function Code	Work Hours	Labor		Materials		Other		Total Estimated Cost	16. Building Number
		OC	Amount	OC	Amount	OC	Amount		
333	350	11	6,000.00	26	2,800.00		0.00	8,800.00	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
345	75	11	589.00	26	13,445.00	18	4,555.00	18,589.00	
TOTAL: 425								27,389.00	17. Organization Code
Click To Edit An Estimated Cost Line									
333	350	11	6,000.00	26	2,800.00		0.00	8,800.00	<div style="border: 1px solid black; height: 20px; width: 100%;"></div>
<div style="display: flex; justify-content: space-between;"> <span>Add Estimate Line</span> <span><b>Update Estimate Line</b></span> <span>Delete Estimate Line</span> <span>End Estimate Update</span> </div>									
18. Action Type								19. Twenty - Five Percent (25%) Limitation	
<input checked="" type="checkbox"/> A - Add <input type="checkbox"/> C - Change <input type="checkbox"/> D - Delete <input type="checkbox"/> N - Completion								0.00	
20. Typed Name and Title of Accomplishing Organization Official						Signature		Date Signed	
21. Typed Name and Title of Concurring Official						Signature		Date Signed	
<div style="display: flex; justify-content: space-around;"> <span>Add</span> <span>Update</span> <span>Delete</span> <span>Contacts</span> <span>Build Work Item</span> <span>Preview</span> <span>Print</span> <span>Exit</span> </div>									

**To add an estimated cost line:**

- Click **Add Estimated Cost Line**
- Enter data in the function code, cost and hours fields. Note that if there is a non-labor, non-materials cost, the object class must be furnished.
- Click **Transmit** to add the line to the estimate, or click **Cancel** to cancel the new line.

**To update an estimated cost line:**

- Click the line to be updated. Its data appears in the active set of fields at the bottom of the estimate area.
- Modify data as desired.
- Click **Update** to record the changes permanently, or **End Estimate Update** to cancel the update. Alternatively, to avoid updating and leave the estimate line unchanged, click a different estimate line.

**Section III - Funding Organization Approval:** This tab contains a space for the name and signature date of the funding organization approving officer. The actual electronic signature is not yet captured in this version of IRIS.

**Section IV - Accomplishing Organization Work Completion**

**Certification:** This tab contains a space for the name and signature date for the organization doing the work to certify that the work is completed. The actual electronic signature is not yet captured in this version of IRIS.

**11.5 REIMBURSABLE WORK AUTHORIZATION (RWA)**

Users can generate new RWAs or view and update existing RWAs. The RWA form in IRIS is designed to replicate the paper form closely, although the different sections are on separate tabs rather than on different parts of a single sheet of paper.

**To generate a new RWA,** click **New RWA** on the WAN System Menu. For more information see Section 11.5.1, Generating a New RWA.

**To view and update existing RWAs,** click **RWA/IBAA**

**Search**, and specify search criteria. If a single RWA matches the criteria, it will be displayed immediately. If more than one RWA matches, the Work In Progress Control screen is displayed and users can double-click the desired RWA to display it for viewing or editing. For more information on the RWA/IBAA Search screen, see Section 11.1, Work Authorization Search. For more information on the Work in Progress Control screen, see Section 11.2, Work in Progress Control.

The RWA consists of six sections. To view a particular section of the RWA, click the tab for that section. The desired section will be exposed to view. The sections are:

- Agency Request
- Agency Billing Request
- GSA Administrative
- GSA Estimate Breakdown
- GSA Approvals
- Multi Buildings/Multiple Functions.

Information on the sections and their data is in Section 11.5.2, RWA Information.

**To preview an RWA** on the screen as it will be printed, click **Preview**. Use the scroll bars to view all portions of the RWA. To print the RWA while previewing, click the printer icon on the preview screen. To change the view size of the preview, click the rightmost button in the top row of the preview screen. **To close the preview and return to the RWA screen**, click the X in the upper right-hand corner of the preview screen.

**To print an RWA**, click **Print**. To set printing options, pull down the **File** menu on the IRIS Main menu, and select **Print Setup**. Users may print to a Windows printer or to a file.

**To delete an RWA**, click **Delete**.

To return to the previous screen, either the Work In Progress Control screen or the WAN System menu, click **Exit**. Users will be prompted to transmit data on new RWAs if they have not done so yet. Users will be prompted to update the RWA if they have changed any information on an existing RWA without clicking **Update**.

### **11.5.1 Generating a New Reimbursable Work Authorization (RWA)**

To generate a new RWA, click **New RWA** on the WAN system menu. This displays the RWA screen, with **Section I** exposed. Click **Add** to open a new RWA. *Don't just start typing!* All information typed into the RWA form will be lost. Users must click **Add** to add an RWA.

When **Add** is clicked, the button changes to read **Transmit**. Click **Transmit** when you are ready to send the new IBAA to the database. Users must transmit your new RWA; otherwise it will not be recorded.

Certain information is required for an RWA. The user must generate a WAN number for the RWA; to do so, use the **Select RWA Type** pulldown arrow on the **Agency Request**. To assign the WAN number:

- Click the **Select RWA Type** pulldown.
- Select the RWA type required.
- Click **OK**.

After the WAN number is assigned, it is displayed in the **RWA Number** box at the top of the screen, and the **Select RWA Type** pulldown is no longer visible.

### **11.5.2 RWA Information**

RWA information is divided into six sections, corresponding to the sections of the February version of the paper RWA form. Each is on its own tab. **To move to a tab**, click the tab title and that tab will be exposed to view. The tabs are shown in Exhibits 11-8 through 11-2, and in Exhibit 11-14.

**Agency Request Tab:** This tab holds basic identifying information on the RWA, including the agency, the work requested, the location where the work will be done, and the contact person in the agency.



## EXHIBIT 11-8

### RWA Screen; Agency Request Tab Exposed

The screenshot shows the 'Reimbursable Work Authorization' window with the 'Agency Request' tab selected. The window has a menu bar with 'File', 'Edit', and 'Help'. The 'RWA Number' field is empty. The 'Agency Request' tab is active, showing fields for 'Select RWA Type', 'Date of Request', 'Name of Agency', 'Site', 'Contact Information', and 'Work Description and work location'. The 'Name of Agency' field is populated with 'NATIONAL BANKRUPTCY REVIEW COMMISSION' and the 'Site' field with 'NOLAND PLAZA BLDG.'. The 'Contact Information' section shows 'Name/Complete address/ZIP' as 'Ray, Betsy Planning 14 Hill Street' and 'Telephone/E-Mail' as 'Telephone ( ) - , Ext. , Fax ( ) - , E-Mail rayb@inquirer.gsa.gov'. The 'Work Description and work location' field is populated with 'Window replacement'. The 'Continuation Sheets Attached' checkbox is unchecked. At the bottom, there are buttons for 'Transmit', 'Update', 'Delete', 'Contacts', 'Build Work Item', 'Preview', 'Print', and 'Cancel'.

Reimbursable Work Authorization		
File Edit Help		
RWA Number: <input type="text"/>		
GSA Estimate Breakdown	GSA Approvals	Multi Buildings/Multiple Function
<b>Agency Request</b>	Agency Billing Request	GSA Administrative
Select RWA Type: <input type="text"/>	1. Date of Request: <input type="text"/>	
2. Name of Agency: <input type="text"/> 4805	3. Site: <input type="text"/> MO1822ZZ	
NATIONAL BANKRUPTCY REVIEW COMMISSION NOLAND PLAZA BLDG.		
4. Contact Information		
Name/Complete address/ZIP: <input type="text"/>	Telephone/E-Mail	
Ray, Betsy Planning 14 Hill Street	Telephone: ( ) - , Ext. , Fax: ( ) - , E-Mail: rayb@inquirer.gsa.gov	
5. Work Description and work location: <input type="text"/>	Continuation Sheets Attached <input type="checkbox"/>	
Window replacement		
Transmit Update Delete Contacts Build Work Item Preview Print Cancel		

Most information on this tab must be selected rather than typed. Select a building by using the pulldown arrow next to the **Building Number** field. Select an agency by using the agency/bureau code pulldown, next to the **Name of Agency** field.

Select a contact by using the pulldown arrow above the **Contact** field. This will fill in any available contact information for the agency contact. To update information on a contact, use the **Contacts** button. See Section 11.6, Agency Contacts, for directions on updating contact information.

**Agency Billing Request Tab:** This tab holds the agency's billing

information, including the billing terms, the requested work start and stop dates, the agency's accounting information, credit card information if applicable, and the name of the official certifying the funds and the date the funds were certified.

### EXHIBIT 11-9 RWA Screen; Agency Billing Request Tab Exposed

**Reimbursable Work Authorization**  
File Edit Help

RWA Number:

GSA Estimate Breakdown    GSA Approvals    Multi Buildings/Multiple Function

Agency Request    **Agency Billing Request**    GSA Administrative

Check as Appropriate    Q - Quarterly    13. Agency Finance Billing Address    S99    D

☒ 6. Plans Attached    10. Requested Work Dates  
☐ 7. Pre - Paid    a. Start    / /  
☐ 8. Modification    b. Completion    / /

11. Agency Location Code    12. Amount Certified by Agency    15a. Credit Card Number    15b. Expiration Date  
43244    44,000.00       / /

14. Agency Accounting Data    17. Type of Card    18. Name of Ordering Official  
Interfund Fund Year    Interfund Act Number         

15 Fund Certification Signer Name and Date    18a. Telephone Number/Ext. of Ordering Official  
/ /    ( ) -   

NOTE: GSA will bill in accordance with FPMR Part 101-21.604(e)

Transmit    Update    Delete    Contacts    Build Work Item    Preview    Print    Cancel

Most information on this tab can be typed directly. To select the agency's billing address, use pulldown above the **Agency Finance Billing Address** field. This displays the list of BOAC codes, with identifying information.

**GSA Administrative Tab:** This tab includes information GSA uses to

track and administer the RWA, including project and work item numbers, billing code, WAN number, and related information. Much of the data is carried over from other tabs of the RWA.

**EXHIBIT 11-10**  
**RWA Screen; GSA Administrative Tab Exposed**

The screenshot shows the 'Reimbursable Work Authorization' application window. The title bar is blue with the text 'Reimbursable Work Authorization'. Below the title bar is a menu bar with 'File', 'Edit', and 'Help'. The main window has a tabbed interface. The 'GSA Administrative' tab is selected and active. The 'RWA Number' field is set to 'B0000968'. The 'GSA Administrative' tab contains several sections: 'Action (Check one)' with radio buttons for 'Add' (selected), 'Change', 'Delete', and 'Complete'; 'Please Check if Appropriate' with checkboxes for 'Cost Breakdown Attached' and 'Multiple Bldg./Function'; a row of input fields for 'Agency Bureau Code' (4712), 'Project No.', 'Organization Code', 'B/A Code' (62), 'BOAC Code' (S97), and 'Lease Number'; and a row of input fields for 'Brief Project Description', 'WAN Number' (B0000968), 'Do Not Bill' (checked), 'Billing Type Indicator', and 'Work Item No.'. At the bottom of the window is a row of buttons: 'Add', 'Update', 'Delete', 'Contacts', 'Build Work Item', 'Preview', 'Print', and 'Exit'.

**GSA Approvals Tab:** This tab holds the names and signature dates of the GSA officials approving the RWA and certifying completion of the work. Actual electronic signature is not yet part of IRIS.

**EXHIBIT 11-11**  
**RWA Screen; GSA Approvals Tab Exposed**

The screenshot shows the 'Reimbursable Work Authorization' application window. The title bar reads 'Reimbursable Work Authorization' and the menu bar includes 'File', 'Edit', and 'Help'. In the top right corner, the 'RwA Number:' is displayed as 'B0000968'. Below this, there are three tabs: 'Agency Request', 'Agency Billing Request', and 'GSA Administrative'. The 'GSA Administrative' tab is active and contains three sub-tabs: 'GSA Estimate Breakdown', 'GSA Approvals', and 'Multi Buildings/Multiple Function'. The 'GSA Approvals' sub-tab is selected. The main form area contains the following fields:

Name/Signature and Date		Phone Number	Total RWA Cost (\$)
<input type="text" value="Carney Sibley"/>		<input type="text" value="12/15/1996"/>	<input type="text" value="720.00"/>
Certificate of Completion Name/Signature and Date			
<input type="text"/>			

At the bottom of the window, there is a row of buttons: 'Add', 'Update', 'Delete', 'Contacts', 'Build Work Item', 'Preview', 'Print', and 'Exit'.

**GSA Estimate Breakdown:** This tab contains information on the estimated time, cost, and materials for accomplishing the requested work.

**EXHIBIT 11-12**  
**RWA Screen; GSA Estimate Breakdown Tab Exposed**

**Reimbursable Work Authorization**  
File Edit Help

RWA Number:

Agency Request			Agency Billing Request				GSA Administrative			
GSA Estimate Breakdown			GSA Approvals				Multi Buildings/Multiple Function			
Building Number	Function Code	Work Hours	Labor		Materials		Other		Total Estimated Cost	
			O/C	Amount	O/C	Amount	O/C	Amount		
M01822ZZ	344	700	11	43,333.00	26	2,000.00	23	34,444.00	79,777.00	
Total: 700 79,777.00										
Click To Edit Estimated Cost Lines										

Click To Edit Estimated Cost Lines

Transmit Update Delete Contacts Build Work Item Preview Print Cancel

Cost estimate lines cannot be typed directly. Dollar cost and labor hours are automatically totaled for all lines. **To edit cost estimates**, click the large **Click to Edit Estimated Cost** button.

In Exhibit 11-13, the user is adding a new estimated cost line.

### EXHIBIT 11-13

#### RWA Screen; Editing Estimated Cost Lines

**Reimbursable Work Authorization**  
File Edit Help

RWA Number: B0000968

Agency Request			Agency Billing Request				GSA Administrative			
GSA Estimate Breakdown			GSA Approvals				Multi Buildings/Multiple Function			
Building Number	Function Code	Work Hours	Labor		Materials		Other		Total Estimated Cost	
			O/C	Amount	O/C	Amount	O/C	Amount		
M01537ZZ	660	660	11	60.00	26	660.00		0.00	720.00	
Total:		660							720.00	

Click To Edit An Estimated Cost Line

M01537ZZ	451	1,200	11	12,500.00	26	4550		0.00	12,500.00
----------	-----	-------	----	-----------	----	------	--	------	-----------

#### To add an estimated cost line:

- Click **Add Estimated Cost Line**.
- Enter data in the function code, cost, and hours fields. Note that if there is a non-labor, non-materials cost, the object class must be furnished.
- Click **Transmit** to add the line to the estimate, or click **Cancel** to cancel the new line.

**To update an estimated cost line:**

- Click the line to be updated. Its data appears in the active set of fields at the bottom of the estimate area.
- Modify data as desired.
- Click **Update** to record the changes permanently, or **End Estimate Update** to cancel the update. Alternatively, to avoid updating and leave the estimate line unchanged, click a different estimate line.

**Multi Buildings/Multiple Function Tab:** On this tab users enter authorized cost breakdowns and other information for RWAs involving multiple buildings or multiple functions. Information and authorized amounts for each building or function are recorded here. The tab works similarly to the **GSA Cost Estimate tab**, in that cost lines cannot be added directly. (See Exhibit 11-14.)

# **EXHIBIT 11-14** **RWA Screen; Multi Buildings/Multiple Function Tab Exposed**

**Reimbursable Work Authorization**  
File Edit Help

RwA Number: B0000968

Agency Request	Agency Billing Request	GSA Administrative
GSA Estimate Breakdown	GSA Approvals	<b>Multi Buildings/Multiple Function</b>

Organization Code	Building Number	Function Code	O/C	Authorized Amount
P0542222	M01537ZZ	344	11	55,444.00
P0547833	M01822ZZ	544	26	34,440.00
Total:				89,884.00

Click To Edit Estimated Cost Lines

Add Update Delete Contacts Build Work Item Preview Print Exit

To add or update estimated cost lines, click the large **Click to Edit Estimated Cost Lines** button.



In Exhibit 11-15, the user is updating the second cost line.

**EXHIBIT 11-15**  
**RWA Screen; Editing Estimated Multi Buildings Cost Lines**

**Reimbursable Work Authorization**  
File Edit Help

RWA Number: B0000968

Agency Request Agency Billing Request GSA Administrative  
GSA Estimate Breakdown GSA Approvals **Multi Buildings/Multiple Function**

Organization Code	Building Number	Function Code	O/C	Authorized Amount
P0542222	M01537ZZ	344	11	55,444.00
P0547833	M0182ZZZ	544	26	34,440.00

Total: 89,884.00

Click To Edit An Estimated Cost Line

P0542222 M01537ZZ 344 11 55,444.00

Add Estimate Line Update Estimate Line Delete Estimate Line End Estimate Update

Add Update Delete Contacts Build Work Item Preview Print Exit

**To add an estimated cost line:**

- Click **Add Estimated Cost Line**.
- Enter data in the function code, cost, and hours fields. Note that if there is a non-labor, non-materials cost, the object class must be furnished.
- Click **Transmit** to add the line to the estimate, or click

**Cancel** to cancel the new line.

**To update an estimated cost line:**

- Click the line to be updated. Its data appears in the active set of fields at the bottom of the estimate area.
- Modify data as desired.
- Click **Update** to record the changes permanently, or **End Estimate Update** to cancel the update. Alternatively, to avoid updating and leave the estimate line unchanged, click a different estimate line.

**11.5.3 Building a Work Item**

When an A-type RWA is complete and approved, users can build a work item for the RWA. As much information as possible is transferred automatically from the RWA to the new work item, and the user must supply additional information required for a valid work item.

**To build the matching work item**, follow these steps:

- Create a new A-type RWA or open an existing A-type RWA for which no work item has yet been built.
- Click **Build Work Item**. If the RWA is complete and approved, the Work Item Data screen will open with information from the RWA transferred to the appropriate fields.
- Add other required information, and any other information needed to complete the work item.
- Click **Transmit** to record the new work item permanently, or **Cancel** to exit without creating the work item.

Only one work item can be built for an RWA.

## **11.6 AGENCY CONTACTS**

Agency contacts are used for both RWA and IBAA's. You cannot add a new contact on the RWA or IBAA screens; you must select from existing contacts. To add a contact or update contact information, click **Contacts** on the RWA or IBAA screen. The Agency Contacts screen is shown in Exhibit 11-16.

The bottom grid displays summary information on all contacts. The top section of the screen holds detailed information on the contact currently selected in the bottom grid. **To select an existing contact for display or update**, click the information on that contact in the bottom grid.

## EXHIBIT 11-16

### Agency Contacts Screen

**Agency Contact Information**  
File Help

Contact Information

Name: Ray, Betsy  
Office: Senate  
Address: 43 Hill Street  
Deep Valley MN 98334  
Phone: ( ) - - Extension: Fax: ( ) - -  
E-Mail Address: rayb@greatworld.edu

All Contacts Click On A Contact To Edit

Name	Office	Address
Contact, Hernab	GSA	www
Ray, Betsy	Senate	43 Hill Street

Add Update Delete Exit

The only required information for the contact is the name. It is recommended that other contact information be provided.

**To add a new contact**, click **Add**, fill in the information, and click **Transmit** to record the new contact permanently.

**To update information on an existing contact**, highlight the contact in the upper grid, modify the information and click **Update** to record the changes permanently.

**To delete a contact**, select that contact in the bottom grid, make sure the desired contact's information appears in the top section of the screen, and click **Delete**. Be careful, as contact information for

contacts used on existing RWA/IBAAs can be deleted.

**To return to the IBAA screen or RWA screen, click **Exit**.** Select the contact you want to assign by using the pulldown arrow above the **Contact** box.

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## **APPENDIX A**

### **RAC/CRC/BRC DETERMINATIONS**

The Risk Assessment Code (RAC) and Condition Risk Category (CRC) for a condition are determined based on the severity of the potential hazard, the probability of the condition becoming hazardous, and the scope of the hazard. The Building Risk Category (BRC) is the highest CRC recorded for any condition in a building.

The RAC depends on the severity and probability of the hazard as shown in the table below:

<b>Severity of Hazard</b>	<b>Probability</b>	<b>RAC</b>
Major	Imminent	1
Major	Probable	1
Major	Possible	2
Major	Remote	4
Substantial	Imminent	1
Substantial	Probable	2
Substantial	Possible	3
Substantial	Remote	4
Minor	Imminent	2
Minor	Probable	3
Minor	Possible	4
Minor	Remote	5
Negligible	Imminent	4
Negligible	Probable	4
Negligible	Possible	5
Negligible	Remote	5

The CRC depends on the RAC and the scope of the hazard as shown in the table below:

<b>Scope</b>	<b>RAC</b>	<b>CRC</b>
Building Wide	1	P1
Building Wide	2	P2
Building Wide	3	R1
Building Wide	4	A1
Building Wide	5	A1
Local	1	R2
Local	2	R2
Local	3	R2
Local	4	A1
Local	5	A1



## **APPENDIX B SAMPLE REPORTS**

This appendix contains sample hardcopy reports for the IRIS system. Reports in IRIS may be displayed on-screen or routed to a local printer in hardcopy format.

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